This guide will cover:

- How to process Procurement Card (p-card) transactions.

**Step One**

Navigate to the **Travel and Expenses** page.
- Upon signing in, this home page will display. Click on the **Navigator button** (the three horizontal lines) in the top left corner:
  - From the Navigator > About Me > Expenses.
- If you are submitting an expense report on behalf of someone who has delegated this access to you, you will see a drop down menu next to Travel and Expenses. You will first select this employee’s name from this drop down menu.
Step Two
Locate and select p-card transaction(s) to add to an Expense Report.

- On the Travel and Expenses page, click on Card Charges to see a list of p-card entries.

**Note:** P-card transactions will be uploaded into WyoCloud daily, as they are received from the bank. There is generally a 1-3 delay as the transaction processes through the merchant and bank.

- Select a P-Card entry to add it to an Expense Report.
- This brings you to the **P-Card Details** page. The **Date**, **Amount** and **Merchant** are all prepopulated based on transactional data.
- Confirm the **Template** defaults to **Expenses**. Ensure that the **Type** accurately describes the p-card transaction that you are reconciling. This field will always default to **P-Card**.

### Step Three

If the transaction is only being charged to one account number, you may change the type field to the proper expense type. However, if the transaction is split between multiple accounts, utilize the **Itemize** feature. When itemizing, do not change the **Type** from the default **P-Card**.

- If any portion of your transaction is to be charged to a grant you **must** complete the **Project fields** **PRIOR** to selecting **Itemize**.
  - Enter the **Project Number** the **Task**, **Contract Number** and **Funding Source** will default in. However if you are using a Cost Share account you will have to click the drop-down on **Funding Source** and click select Internal.
- After completing the project information (or first if entire transaction is to be charged to a general ledger account), click **Itemize**.

- Select the appropriate expense type from the **Type** drop down menu.
- Enter the portion of the transaction to be charged to that expense type in the **Amount** field. If the full charge falls under just one expense type, enter the full dollar amount.
- Click the **arrow** to the left of the expense type to expand additional details.
  - **Description:** Enter the business purpose for the expense.
  - **Account:** Enter the appropriate account.
    - *If you input grant information prior to clicking Itemize, you will see this grant information defaults in this first expense type. Make any adjustments needed.*

- If the transaction falls under more than one expense type, click the plus sign (+) to add additional lines. And make any necessary changes to funding sources needed.
Enter the **Type**, **Amount**, **Description** and **Account** for all additional lines.

Once complete, verify the **Remaining Balance** equals zero to ensure the full transaction is itemized.

Click **Add to Report**. You may create a new Expense Report, or add to an existing one by clicking the **arrow** next to **Add to Report**.

On the **Expense Report** page, verify that the p-card transaction appears as a line item, click the **Add** icon to attach receipts or documentation, then click **Save**.
Step Four
Review and submit the Expense Report for approval.

- On the Expense Report page, review lines in the Expense Items area, check the box next to “I have read and accept the corporate travel and expense policies.” and click Submit.

- Click OK on the Confirmation pop-up.

You have now completed the steps of how to enter an Expense Report containing p-Card items.